

**SAWS OVERSIGHT PROCESSES BINDER
RECORD OF CHANGE LOG – SECTION 13**

SECTION NAME: Consultant Procurement
RESPONSIBLE PARTY: Arlene Mendibles – Lead Analyst
BRIEF DESCRIPTION OF SECTION: SAWS Oversight requires the use of specialized consultant services. The Procurement process involves SAWS Financial, Administrative, and Oversight staff. This section describes the procedures that guide the procurement process from inception through completion.

CHANGE LOG

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CONSULTANT PROCUREMENT

SAWS Oversight staff/management require specialized consultant services. The SAWS Financial and Administrative Services section has lead responsibility for processing requests for consultant services and provides a Procurement Coordinator for the SAWS Project. The following general procedures are in place to guide the procurement process. Responsibilities of the various parties are identified.

1. Hiring Supervisor/Consortium Liaison identifies need for consultant services, requests funding approval via APD or identifies existing funding.
2. The supervisor assigns an analyst to draft a job duty statement. Sample job duty statements are available through the Procurement Coordinator.
3. Procurement Coordinator finalizes the job duty statement, establishes a schedule for the solicitation, and e-mails a note with the job duty statement to several vendors on the California Multiple Award Schedule (CMAS) when appropriate and the Information Technology Master Service Agreement (MSA).
4. Vendors submit resumes and any other pertinent information (e.g., rates, qualifications, etc.) to the Procurement Coordinator.
5. Procurement Coordinator forwards resumes to the Hiring Supervisor or Consortium Liaison.
6. Hiring Supervisor/liaison reviews the resumes for project requirements, schedules interviews, selects one or more consultants and forwards the name(s) to the Procurement Coordinator to begin the hiring process.
7. Procurement Coordinator reviews the resume(s) to ensure the consultant(s) meets the CMAS or MSA classification requirements, negotiates the rates and terms, finalizes the statement of work, develops the hiring activity report, develops a justification, confirms the budget dollars, submits a Customer Service System request and forwards the documentation to the HHSDC Procurement Unit for processing. As appropriate the consortium liaison will develop the finalized statement of work, hiring activity report, and justification, forward to the Procurement Coordinator who will finalize the documents and complete the process as noted above.
8. Procurement Unit develops a purchase order (PO), submits the PO to the Director's Office for approval and forwards a copy of the signed PO to the Procurement Coordinator.

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9. Procurement Coordinator informs the Hiring Supervisor, Consortium Liaison, the Personnel Coordinator, the Facility Coordinator, LAN Support and the Deputy Director Secretary that the consultant has been approved to begin work providing the company name and the term of the contract.
10. Hiring Supervisor has responsibility for directing and monitoring consultant activities and for ensuring the completion of tasks identified in the statement of work. Modifications to the statement of work need to be brought to the attention of the Procurement Coordinator and documented as necessary.
11. Procurement Coordinator will inform the Hiring Supervisor/Consortium Liaison of any changes, or potential changes, to the consultant staff under contract or to these procedures.